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Canada

MARKET ACCESS SECRETARIAT
Global Analysis Report

Competitive Trade Analysis

Fresh, Frozen and Processed Fish Products in France

September 2016

REPORT CONTENT SUMMARY

This report looks to highlight fresh, frozen and processed fish imports into France, and attempts to identify the best opportunities for Canadian exports.

Specifically, the data analysis that follows focusses on the top ten French fresh, frozen or processed fish imports, of which Canada may be a supplier. It identifies the gap between France's imports from the world and the proportion provided by Canada, and then outlines top international competitors.

Unless otherwise specified, all figures in this document are based on import data as reported by France Customs, and were sourced from Global Trade Atlas (2016).

FRANCE MARKET SUMMARY

France's fish supply was diversified, as it imported fresh, frozen and processed fish from over 100 countries. The country's top suppliers in 2015 were Norway (with a 17.4% market share), the United Kingdom (9.6%), Spain (7.4%), China (4.6%), and Germany (4.4%).

France's top imported products were fresh/chilled Atlantic salmon, accounting for 16.2% of overall of fresh, frozen and processed fish products imports, in 2015, followed by prepared tuna, skipjack or bonito (12.2%), and fresh or chilled fish of the bregmacerotidae family.

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TRADE OVERVIEW

According to the Food and Agriculture Organization (FAO), France is a major seafood importer, as its domestic production is significantly lower than its total demand. France is a major consumer and net importer of many fresh, frozen and processed fish products.

In 2015 France imported over C$7.5 billion of fish and seafood products from the world; of which, C$100.1 million was from Canada (based on France's import data). Fresh, frozen and processed fish products were valued at C$15.8 million, an 8.8% value increase from 2014 levels.

France's Top Ten Suppliers of Fresh, Frozen and Processed Fish Products, C$ Millions

Country		2011	2012	2013	2014	2015	CAGR % 2011-15
World		**4,299.75**	**4,055.15**	**4,645.04**	**4,886.23**	**4,929.85**	**3.48**
1	Norway	790.87	730.75	886.81	877.82	858.02	2.06
2	United Kingdom	352.09	293.54	380.10	439.49	471.45	7.57
3	Spain	330.32	282.02	322.96	341.91	364.96	2.52
4	China	264.28	216.08	188.96	202.99	231.14	-3.29
5	Germany	140.21	150.81	164.28	193.19	218.12	11.68
6	Iceland	125.84	116.91	140.83	190.18	214.76	14.30
7	United States	173.55	168.70	169.40	171.52	211.04	5.01
8	Denmark	219.44	169.90	187.09	191.67	190.37	-3.49
9	Poland	165.36	159.14	194.84	180.88	180.38	2.20
10	Netherlands	139.85	136.78	146.87	166.54	172.60	5.40
40	Canada	11.26	8.43	14.39	14.60	15.80	8.83

France's Top Ten Suppliers of Fresh, Frozen and Processed Fish Products,

Country		2011	2012	2013	2014	2015	PP Change 2011-15 %
1	Norway	18.39	18.02	19.09	17.97	17.40	-0.99
2	United Kingdom	8.19	7.24	8.18	8.99	9.56	1.37
3	Spain	7.68	6.95	6.95	7.00	7.40	-0.28
4	China	6.15	5.33	4.07	4.15	4.69	-1.46
5	Germany	3.26	3.72	3.54	3.95	4.42	1.16
6	Iceland	2.93	2.88	3.03	3.89	4.36	1.43
7	United States	4.04	4.16	3.65	3.51	4.28	0.24
8	Denmark	5.10	4.19	4.03	3.92	3.86	-1.24
9	Poland	3.85	3.92	4.19	3.70	3.66	-0.19
10	Netherlands	3.25	3.37	3.16	3.41	3.50	0.25
40	Canada	0.26	0.21	0.31	0.30	0.32	0.06

Fresh, Frozen and Processed Fish Products Supply Gap, C$ Millions

	2011	2012	2013	2014	2015	CAGR % 2011-15
France's imports from the world	4,299.75	4,055.15	4,645.04	4,886.23	4,929.85	3.48
France's imports from Canada	11.26	8.43	14.39	14.60	15.80	8.83
Supply gap	4,288.49	4,046.72	4,630.65	4,871.63	4,914.05	3.46

France's Top Ten Fresh, Frozen and Processed Products Fish Imports from the World, C$ Millions and % Share

Commodity	Description	C$ Millions			% Share			% Change 2015/2014
		2013	2014	2015	2013	2014	2015	
Total		**4,645.04**	**4,886.23**	**4,929.85**	**100.00**	**100.00**	**100.00**	**0.89**
030214	Fresh/chilled Atlantic salmon	790.61	815.94	798.60	17.02	16.7	16.2	-2.12
160414	Prepared /preserved tunas/skipjack/bonito	707.14	702.38	604.54	15.22	14.37	12.26	-13.93
030444	Fresh/chilled fillets bregmacerotidae	198.62	234.79	256.92	4.28	4.81	5.21	9.42
030481	Frozen salmon fillets	184.13	237.61	206.38	3.96	4.86	4.19	-13.14
030441	Fresh/chilled salmon fillet	196.61	207.89	206.16	4.23	4.25	4.18	-0.83
030475	Frozen Alaska pollock fillets	164.51	158.53	190.81	3.54	3.24	3.87	20.36
030471	Frozen cod fillets	141.94	152.49	170.44	3.06	3.12	3.46	11.77
160420	Prepared or preserved fish	150.24	154.46	159.64	3.23	3.16	3.24	3.36
160419	Prepared whole fish or in pieces	119.44	138.45	151.63	2.57	2.83	3.08	9.52
030541	Smoked salmon	127.41	132.31	135.54	2.74	2.71	2.75	2.44

1. FRESH, CHILLED ATLANTIC SALMON

France's Top Ten Suppliers of Fresh or Chilled Atlantic Salmon, C$ Millions and % Share

Country	C$ Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	790.61	815.94	798.60	100.00	100.00	100.00	- 2.12
Norway	542.95	526.37	496.02	68.67	64.51	62.11	- 5.77
United Kingdom	152.52	198.31	211.23	19.29	24.30	26.45	6.51
Ireland	24.85	29.43	40.17	3.14	3.61	5.03	36.50
Sweden	35.64	28.53	20.99	4.51	3.50	2.63	- 26.44
Denmark	15.00	12.69	10.63	1.90	1.55	1.33	- 16.23
France (Territories)	3.13	5.07	7.59	0.40	0.62	0.95	49.55
Faroe Islands	7.98	5.91	2.15	1.01	0.72	0.27	- 63.54
Estonia	0.42	2.61	2.04	0.05	0.32	0.26	- 21.95
Poland	1.75	2.09	1.92	0.22	0.26	0.24	- 8.32
Spain	1.68	0.91	1.54	0.21	0.11	0.19	69.04
Canada	0.34	0.08	0.00	0.04	0.01	0.00	- 100.00

Fresh or Chilled Salmon Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	790.61	815.94	798.60	0.50
France's imports from Canada	0.34	0.08	0.00	-100.00
Supply gap	790.27	815.86	798.60	0.53

2. PREPARED TUNAS, SKIPJACK AND BONITO (SARDA SPP)**

France's Top Ten Suppliers of Prepared Tunas, Skipjack and Bonito, C$ Millions and % Share

Country	C$ Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	707.14	702.38	604.54	100.00	100.00	100.00	- 13.93
Spain	132.32	146.81	114.55	18.71	20.90	18.95	- 21.97
Seychelles	156.29	147.02	112.89	22.10	20.93	18.67	- 23.22
Ghana	51.58	62.76	98.68	7.29	8.94	16.32	57.23
Cote d Ivoire	120.32	95.86	94.54	17.02	13.65	15.64	- 1.38
Ecuador	89.14	80.04	70.90	12.61	11.39	11.73	- 11.41
Mauritius	33.62	41.78	24.70	4.75	5.95	4.09	- 40.88
Thailand	37.88	38.87	21.60	5.36	5.53	3.57	- 44.44
Madagascar	35.70	33.73	19.90	5.05	4.80	3.29	- 41.01
Papua New Guinea	10.60	7.37	6.79	1.50	1.05	1.12	- 7.92
Senegal	5.99	10.05	5.40	0.85	1.43	0.89	- 46.31

****Note:** Canada exports prepared tunas, skipjack and bonitos to the world, but is not a supplier to France

Prepared Tuna, Skipjack and Bonito Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	707.14	702.38	604.54	-7.54
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	707.14	702.38	604.54	-7.54

N/C: Not Calculable

3. FRESH FISH FILLETS OF BREGMACEROTIDAE

France's Top Ten Suppliers of Fresh Fish Fillets of Bregmacerotidae, C$ Millions and % Share

Country	C$ Millions			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	198.62	234.79	256.92	100.00	100.00	100.00	9.42
Iceland	53.52	79.51	104.06	26.94	33.86	40.50	30.88
Denmark	38.37	52.21	61.43	19.32	22.24	23.91	17.65
United Kingdom	35.26	27.11	24.53	17.75	11.55	9.55	- 9.51
Norway	20.37	22.47	20.61	10.25	9.57	8.02	- 8.29
Poland	11.41	11.78	13.46	5.75	5.02	5.24	14.28
Netherlands	12.18	13.29	8.55	6.13	5.66	3.33	- 35.66
Belgium	9.10	12.59	8.26	4.58	5.36	3.21	- 34.44
France (Territories)	3.86	5.98	7.36	1.95	2.55	2.87	23.11
Spain	2.12	1.96	2.20	1.07	0.84	0.86	12.07
Sweden	5.48	4.65	1.78	2.76	1.98	0.69	- 61.76

Note: Canada exports fish of the Bregmacerotidae family, but is not a supplier to France.

Fresh Fish Fillets of Bregmacerotidae Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	198.62	234.79	256.92	13.73
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	198.62	234.79	256.92	13.73

N/C: Not Calculable

4. FROZEN SALMON FILLETS

France's Top Ten Suppliers of Frozen Salmon Fillets, C$ Millions and % Share

Country	$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	184.13	237.61	206.38	100.00	100.00	100.00	- 13.14
Chile	64.11	69.60	59.18	34.82	29.29	28.68	- 14.97
Norway	43.85	48.19	46.51	23.81	20.28	22.54	- 3.48
China	29.77	33.30	32.19	16.17	14.01	15.60	- 3.32
United States	12.54	15.42	20.99	6.81	6.49	10.17	36.11
Estonia	3.74	15.22	12.44	2.03	6.41	6.03	- 18.27
Poland	8.03	12.45	8.88	4.36	5.24	4.30	- 28.66
Ireland	2.70	4.66	6.22	1.47	1.96	3.01	33.49
United Kingdom	1.01	1.17	3.01	0.55	0.49	1.46	157.48
Germany	0.70	1.97	2.57	0.38	0.83	1.24	30.51
Latvia	1.26	0.54	2.55	0.68	0.23	1.23	370.50
Canada	0.38	0.51	1.02	0.21	0.21	0.49	100.60

Frozen Salmon Fillets Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	184.13	237.61	206.38	5.87
France's imports from Canada	0.38	0.51	1.02	62.99
Supply gap	183.74	237.10	205.36	5.72

5. FRESH SALMON FILLETS

France's Top Ten Suppliers of Fresh Salmon Fillets, C$ Millions and % Share

Country	$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	196.61	207.89	206.16	100.00	100.00	100.00	- 0.83
Norway	168.49	164.90	168.72	85.70	79.32	81.84	2.32
Sweden	3.30	14.88	11.07	1.68	7.16	5.37	- 25.63
United Kingdom	11.64	11.94	7.70	5.92	5.74	3.73	- 35.54
Denmark	3.11	5.20	4.17	1.58	2.50	2.02	- 19.89
Estonia	0.00	0.00	3.94	0.00	0.00	1.91	0.00
Poland	2.29	2.63	2.35	1.16	1.26	1.14	- 10.32
Belgium	0.36	2.38	1.87	0.18	1.15	0.91	- 21.54
Canada	1.04	1.44	1.51	0.53	0.69	0.73	5.23
Ireland	1.83	1.32	1.21	0.93	0.64	0.58	- 8.77
Germany	0.17	0.19	0.96	0.09	0.09	0.47	398.80

Fresh Salmon Fillets Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	196.61	207.89	206.16	2.40
France's imports from Canada	1.04	1.44	1.51	20.61
Supply gap	195.57	206.45	204.65	2.29

6. FROZEN ALASKA POLLOCK FILLETS

France's Top Ten Suppliers of Frozen Alaska Pollock Fillets, C$ Millions and % Share

Country	$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	164.51	158.53	190.81	100.00	100.00	100.00	20.36
China	63.48	62.25	73.53	38.58	39.26	38.53	18.12
Russia	42.05	33.69	42.68	25.56	21.25	22.37	26.68
United States	33.77	34.59	40.87	20.52	21.82	21.42	18.16
Germany	22.02	23.99	26.17	13.39	15.13	13.72	9.11
Netherlands	0.39	0.15	2.20	0.24	0.09	1.15	1395.10
Belgium	1.98	2.19	1.84	1.20	1.38	0.97	- 15.68
Lithuania	0.00	0.00	1.40	0.00	0.00	0.74	0.00
United Kingdom	0.15	0.29	1.06	0.09	0.18	0.56	268.11
Thailand	0.37	0.49	0.58	0.22	0.31	0.31	20.25
Czech Republic	0.00	0.07	0.26	0.00	0.04	0.14	266.51
Canada	0.01	0.01	0.01	0.01	0.00	0.01	92.78

Frozen Alaska Pollock Fillets Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	164.51	158.53	190.81	7.70
France's imports from Canada	0.01	0.01	0.01	0.04
Supply gap	164.50	158.53	190.80	7.70

7. FROZEN COD FILLETS

France's Top Ten Suppliers of Frozen Cod Fillets, C$ Millions and % Share

Country	$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	141.94	152.49	170.44	100.00	100.00	100.00	11.77
China	37.41	40.27	52.20	26.35	26.41	30.63	29.64
Norway	28.15	25.91	27.56	19.83	16.99	16.17	6.37
Poland	21.95	17.62	19.86	15.47	11.55	11.65	12.73
Iceland	11.03	17.87	17.66	7.77	11.72	10.36	- 1.20
Russia	10.50	14.91	13.78	7.39	9.78	8.09	- 7.55
Germany	4.62	8.42	10.69	3.25	5.52	6.27	26.92
Spain	4.39	3.88	7.22	3.10	2.54	4.24	86.15
United Kingdom	4.02	4.25	4.82	2.83	2.78	2.83	13.48
Belgium	3.20	5.01	4.50	2.25	3.29	2.64	- 10.24
Denmark	3.90	3.48	2.52	2.75	2.28	1.48	- 27.60
Canada	1.66	1.52	0.99	1.17	1.00	0.58	- 35.01

Frozen Cod Fillets Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	141.94	152.49	170.44	9.58
France's imports from Canada	1.66	1.52	0.99	-22.95
Supply gap	140.28	150.98	169.45	9.91

8. PREPARED FISH PRODUCTS

France's Top Ten Suppliers of Prepared Fish Products, C$ Millions and % Share

Country	$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	150.24	154.46	159.64	100.00	100.00	100.00	3.36
Morocco	25.56	25.26	25.44	17.01	16.35	15.94	0.72
Spain	8.29	7.86	25.00	5.52	5.09	15.66	218.03
Germany	21.63	21.06	23.34	14.40	13.64	14.62	10.78
Belgium	20.46	23.44	21.69	13.62	15.18	13.58	- 7.50
Lithuania	22.99	20.94	16.72	15.30	13.55	10.47	- 20.15
Cote d Ivoire	4.53	5.06	6.34	3.01	3.28	3.97	25.34
Thailand	6.33	4.43	5.12	4.21	2.87	3.21	15.66
Italy	3.34	4.23	3.82	2.22	2.74	2.40	- 9.69
China	2.59	2.83	3.53	1.73	1.83	2.21	24.93
Norway	2.94	3.64	3.23	1.96	2.36	2.03	- 11.25

**Note: Canada exports prepared fish products to the world, but is not a supplier to France

Prepared Fish Products Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	150.24	154.46	159.64	3.08%
France's imports from Canada	-	367	-	N/C
Supply gap	150.24	- 212.54	159.64	3.08%

N/C: Not Calculable

9. PREPARED OR PRESERVED WHOLE FISH PRODUCTS

France's Top Ten Suppliers of Prepared/Preserved Whole Fish Products, C$ Millions and % Share

Country	$C Millions			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	119.44	138.45	151.63	100.00	100.00	100.00	9.52
Germany	63.09	79.48	93.19	52.82	57.41	61.46	17.25
Denmark	18.91	21.05	23.04	15.84	15.20	15.20	9.49
Netherlands	9.61	9.24	7.28	8.04	6.67	4.80	- 21.20
Malaysia	2.49	4.34	5.35	2.09	3.13	3.53	23.37
Sweden	4.04	3.20	4.37	3.38	2.31	2.88	36.56
France	4.83	4.80	3.62	4.04	3.47	2.39	- 24.65
Portugal	2.49	3.34	3.22	2.09	2.41	2.12	- 3.53
Poland	2.86	2.53	2.26	2.40	1.83	1.49	- 10.65
Spain	1.54	2.17	2.12	1.29	1.57	1.40	- 2.26
United Kingdom	1.16	1.02	1.67	0.97	0.74	1.10	63.34
Canada	0.00	0.00	0.00	0.00	0.00	0.00	- 100.00

**Note: Canada exports prepared whole fish products, but is small supplier to France

Prepared Whole Fish Products Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	119.44	138.45	151.63	12.67
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	119.44	138.45	151.63	12.67

N/C: Not Calculable

10. SMOKED SALMON

France's Top Ten Suppliers of Smoked Salmon, C$ Millions and % Share

Country	$C Millions			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	127.41	132.31	135.54	100.00	100.00	100.00	2.44
Poland	96.54	85.38	81.20	75.77	64.52	59.91	- 4.89
United Kingdom	6.67	11.31	17.83	5.23	8.55	13.15	57.60
Belgium	5.46	8.45	9.70	4.28	6.38	7.15	14.83
Germany	7.68	8.77	7.58	6.03	6.63	5.59	- 13.59
Lithuania	0.51	6.32	5.81	0.40	4.78	4.29	- 8.10
Norway	2.78	4.51	5.43	2.18	3.41	4.00	20.21
Denmark	2.84	2.04	1.91	2.23	1.54	1.41	- 6.30
Ireland	0.71	1.38	1.59	0.56	1.04	1.17	15.04
Chile	0.86	0.60	1.36	0.68	0.45	1.00	126.07
Estonia	0.08	1.50	0.94	0.06	1.13	0.70	- 37.09

Smoked Salmon Supply Gap, C$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	127.41	132.31	135.54	3.14
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	127.41	132.31	135.54	3.14

N/C: Not Calculable

RETAIL ENVIRONMENT

Although Canada main exports to France are crustacean products, there are opportunities in fresh, frozen and processed fish categories, even if France is described as mature market. France is a major importer of several products for which Canada is a major producer, such as salmon.

France's imports from Canada of fresh, frozen and processed products

Commodity	C$
030254 fresh or chilled hake	4,029,713
030499 frozen fish meat (excl. swordfish, tooth fish and fillets)	2,293,918
030213 fresh or chilled pacific salmon	2,245,275
030441 fresh or chilled fillets of pacific salmon	1,509,473
030542 smoked herring	1,243,881
030481 frozen fillets of pacific salmon	1,016,704

DISTRIBUTION CHANNELS

The retail channel accounted for over 81% of fresh fish and seafood sales in France, followed by the foodservice channel with 14.4%. The share of the retail channel increased between 2011 and 2015, while that of the foodservice and institutional channels saw a slight decline over that same period.

Distribution of Fresh Fish and Seafood Sales in France – Percentage (%) Breakdown Based on Volume Sales

% total volume	2011	2012	2013	2014	2015
Retail	80.9	81.6	82.7	82.2	81.8
Foodservice	15.0	14.8	14.6	14.5	14.4
Institutional	4.1	3.6	2.7	3.3	3.8
Total	100	100	100	100	100

Source: *Euromonitor 2016.*

CONCLUSION

French consumers consume a wide variety of wild caught fish and farmed fish. According to the FAO, the increase in consumption in recent years is the result of increasingly modern and healthy lifestyle choices and this trend will continue for years to come, as fish is promoted as a healthy food in the media and due to the nutritional needs of an aging population.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

Overview of Trade Commissioner Services in France

http://www.tradecommissioner.gc.ca/e-f/fr/index.htm

Find a Trade Commissioner

www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

www.ats-sea.agr.gc.ca

For additional Information on Seafood Expo Global 2016, please contact:

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Trade Show Strategy and Delivery
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RESOURCES:

Euromonitor International, 2016. Fish and Seafood in France.

Euromonitor International, 2016. *Packaged Food in France*.

Global Trade Atlas Database, 2016.

http://www.francefilierepeche.fr

http://www.franceagrimer.fr

http://www.fao.org/fishery/statistics/en

Competitive Trade Analysis: **Fresh, Frozen and Processed Fish Products in France**

Global Analysis Report
Prepared by: Karim Zarrouki, Senior Market Analyst

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